2013 Alberta Tourism Market Monitor

Alberta Tourism, Parks and Recreation

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2013 (000's of enplanements and deplanements) [1]													
Edmonton International Total	551.7p	541.6p	594.9p	572.4p	573.7p	557.1p	629.6p	663.2p	557.6p	568.3p	559.0p	**614.4p**	**6,983.2p**
Per cent change from 2012	3.6%	2.4%	3.8%	2.9%	4.5%	5.5%	5.1%	5.2%	5.4%	3.2%	3.5%	**9.9%**	**4.6%**
Domestic	389.3p	376.1p	415.0p	412.2p	449.5p	460.5p	520.0p	545.8p	453.8p	445.2p	405.7p	**439.1p**	**5,312.2p**
Per cent change from 2012	3.1%	1.3%	3.3%	3.3%	3.8%	5.3%	4.8%	4.2%	4.8%	2.0%	2.3%	**8.9%**	**4.0%**
Transborder	111.4p	116.5p	124.6p	114.9p	98.8p	79.2p	90.3p	97.4p	87.1p	109.2p	113.0p	**122.4p**	**1,264.8p**
Per cent change from 2012	7.4%	7.8%	6.5%	1.5%	6.1%	11.3%	8.3%	11.7%	10.1%	8.6%	4.0%	**12.2%**	**7.7%**
International	50.9p	49.1p	55.3p	45.2p	25.4p	17.3p	19.3p	19.9p	16.7p	13.9p	34.6p	**406.2p**	**406.2p**
Per cent change from 2012	-0.4%	-1.2%	1.6%	2.2%	11.3%	-9.9%	-2.6%	1.3%	-0.5%	0.5%	16.3%	**13.2%**	**3.4%**
Calgary International Total	1,092.4p	1,052.9r	1,187.8r	1,144.2r	1,151.p	1,160.8p	1,359.3r	1,438.7r	1,191.8p	1,206.9r	1,114.3p		13,100.2p
Per cent change from 2012	3.7%	2.1%	5.5%	3.5%	5.4%	1.9%	3.9%	6.7%	5.5%	6.2%	6.2%		4.6%
Domestic	743.8p	707.1r	786.2r	786.4r	819.6r	837.7p	982.5r	1,038.5r	857.5p	878.7r	788.8p		9,226.9p
Per cent change from 2012	5.7%	3.8%	6.8%	5.4%	5.0%	1.7%	3.4%	5.5%	5.5%	5.9%	4.8%		4.8%
Transborder	230.1p	236.2p	269.1r	245.6p	230.7p	217.6p	261.1p	278.4p	233.2p	241.2r	225.3p		2,668.5p
Per cent change from 2012	4.1%	0.9%	3.6%	3.9%	8.3%	3.6%	8.6%	13.9%	9.8%	7.2%	10.7%		6.7%
International	118.5p	109.6p	132.5p	112.2p	100.7p	105.5p	115.7p	121.8p	101.2p	87.0p	100.2p		1,204.9p
Per cent change from 2012	-8.0%	-5.5%	2.5%	-8.7%	2.5%	0.4%	8.6%	1.6%	-3.6%	6.6%	8.5%		-1.0%
Highway Count 2013 (000's of vehicles) [2]													
Hwy 1 -Sask border w-bound	55.3p	56.0p	63.7p	65.5p	78.6p	77.3p	103.1p	108.7p	80.5p	80.4p	65.9p		835.0p
Per cent change from 2012	-2.1%	-5.6%	2.2%	-7.9%	3.4%	-3.9%	-0.9%	1.2%	0.9%	3.7%	5.1%		-0.2%
Hwy 1 - Banff Pk Gate (2-way)	457.3p	472.4p	535.3p	459.8p	580.0p	457.8p	782.3p	937.5p	654.0p	522.1p	403.6p		6,262.1p
Per cent change from 2012	6.1%	8.0%	13.8%	-5.1%	6.1%	-19.1%	-3.5%	7.8%	2.0%	13.2%	2.4%		2.4%
Hwy 16 - Jasper Pk Gate (2 way)	89.9p	86.4p	112.9p	107.3p	136.3p	176.3p	213.2p	247.3p	155.9p	118.4p	81.0p		1,524.9p
Per cent change from 2012	-1.0%	-4.4%	4.2%	-8.1%	4.3%	21.7%	3.6%	7.6%	3.9%	6.3%	1.9%		4.5%
Hwy 16 - Jct #897 w-bound	165.0p	160.1p	176.2p	178.9p	200.2p	198.7p	215.0p	221.6p	201.8p	207.0p	180.0p		2,104.5p
Per cent change from 2012	1.5%	-2.7%	0.5%	-3.3%	1.9%	0.6%	2.4%	1.1%	3.2%	5.1%	1.6%		1.2%
National Park Attendance (000's of person visits) 2013 [3] Does not include Group Tours.													
Banff	165.1p	159.9p	198.5p	193.1p	253.1p	211.4p	512.1p	603.8p	389.0p				2,686.0p
Per cent change from 2012	4.8%	-3.3%	9.6%	-9.4%	4.0%	-20.4%	-0.8%	7.1%	1.5%				-0.1%
Jasper	48.0p	49.1p	64.4p	120.9p	158.4p	174.5p	367.4p	430.0p	271.7p				1,684.4p
Per cent change from 2012	0.0%	-3.5%	5.6%	-8.1%	4.3%	2.9%	1.2%	7.2%	2.4%				2.6%
Waterton Lakes	6.4p	7.6p	8.7p	9.4p	30.5p	61.0p	94.4p	103.5p	57.0p				378.5p
Per cent change from 2012	3.2%	-3.8%	17.6%	-23.0%	-2.2%	12.8%	-3.3%	4.4%	-5.6%				0.6%
Employment (000's of persons) 2013 Seasonally Adjusted [4]													
Accommodation and Food Services	130.3	130.7	119.1	124.2	129.9	131.9	133.6	138.2	144.0	144.6	146.4	**148.9p**	**135.2**
Per cent change from 2012	1.3%	-5.4%	-8.1%	-6.4%	-9.6%	-0.2%	0.5%	5.0%	9.8%	11.1%	6.3%	**12.7%**	**1.4%**
Sources: Edmonton International Airport, Calgary International Airport, Alberta Transportation, Parks Canada, Statistics Canada													

New monthly figures are shown in bold type. Revisions will be bolded. p=preliminary r=revised e=estimate 24-Jan-14

2013 Alberta Tourism Market Monitor

Alberta Tourism, Parks and Recreation

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Accommodation Indices 2013 [5]													
Edmonton Occupancy Rate	54.9%	70.1%	74.1%	76.3%	71.9%	73.5%	65.0%	71.6%	74.3%	74.1%	**75.5%**		**70.9%**
Point change from 2012	3.1	2.7	3.1	7.3	-0.5	5.0	-0.6	2.2	5.0	4.2	**2.2**		**3.0**
Average Daily Room Rate	$122.89	$126.33	$127.98	$128.28	$127.16	$128.49	123.82	$123.80	$129.41	$130.58	**$132.61**		**$127.34**
Calgary Occupancy Rate	59.5%	66.2%	69.6%	75.5%	74.7%	75.8%	84.1%	80.5%	80.6%	77.2%	**74.7%**		**74.3%**
Point change from 2012	2.1	2.7	1.8	7.0	3.1	-2.4	0.8	4.3	-2.2	2.4	**3.4**		**1.9**
Average Daily Room Rate	$154.93	$157.46	$152.51	$161.52	$160.89	$169.95	$186.32	$149.31	$163.85	$166.57	**$164.02**		**$163.03**
Alberta Resorts Occupancy Rate	37.0%	44.5%	52.9%	43.1%	55.5%	64.6%	78.4%	87.1%	77.7%	51.6%	**41.2%**		**57.8%**
Point change from 2012	1.2	0.0	3.8	-2.9	2.2	-5.1	-3.1	1.9	2.0	3.6	**4.7**		**0.6**
Average Daily Room Rate	$161.05	$167.87	$169.43	$158.48	$180.26	$226.61	$246.67	$250.19	$223.15	$172.40	**$162.92**		**$202.40**
Other Alberta* Occupancy Rate	56.1%	63.6%	63.9%	57.5%	58.7%	63.9%	70.9%	70.6%	71.1%	70.2%	**68.8%**		**65.1%**
Point change from 2012	1.3	2.2	0.1	3.6	0.1	-1.0	4.5	2.9	4.8	4.5	**2.7**		**2.4**
Average Daily Room Rate	$124.25	$125.29	$126.14	$124.60	$123.83	$125.00	$125.45	$125.13	$125.82	$125.88	**$127.66**		**$125.50**
Total Alberta (excluding Resorts) Occupancy Rate	56.7%	66.2%	68.6%	68.2%	67.1%	70.1%	73.0%	73.8%	74.8%	73.4%	**72.4%**		**69.5%**
Point change from 2012	2.0	2.4	1.4	5.4	0.5	0.2	2.0	3.2	2.9	3.7	**2.6**		**2.3**
Average Daily Room Rate	$133.15	$134.98	$134.50	$137.68	$136.83	$140.22	$145.28	$132.52	$138.94	$139.89	**$140.29**		**$137.86**
Food Services and Drinking Places ($Millions) unadjusted [6]													
Total Receipts for Alberta	$606.1r	$609.2r	$686.3r	$661.1r	$700.2r	$686.7r	$704.6r	**$713.1r**	**$696.6r**	**$715.7p**			**$678.0p**
Per cent change from 2012	5.1%	3.5%	4.6%	7.6%	8.3%	4.5%	5.6%	**8.1%**	**7.2%**	**9.9%**			**6.5%**
Historic Sites and Museums 2013 (000s of person visits) [7]													
Visitor Attendance	21.2p	42.7p	42.7p	42.7p	74.7p	101.7r	158.4p	181.0p	69.3p	40.2p	24.8p	**17.5p**	**816.0p**
Per cent change from 2012	6.0%	5.5%	6.4%	-5.5%	7.0%	-0.8%	-8.3%	-1.3%	-4.1%	11.8%	-3.9%	**-17.2%**	**-1.5%**

Sources: PKF Consulting, Statistics Canada, Alberta Culture

New monthly figures are shown in bold type. Revisions will be bolded. p=preliminary r=revised e=estimate 24-Jan-14

Definitions of Indicators

Alberta Tourism Market Monitor

1. Air Passengers - Numbers are preliminary estimates of the number of air passengers enplaning and deplaning at the Edmonton International and Calgary International Airports.
Source: Edmonton International Airport and Calgary International Airport Websites

2. Highway Traffic: These data are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the dierction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year-to-date is a cumulative total for all vehicles.

Source: Alberta Transportation's Automatic Traffic Recorders (ATR).

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Beginning in 2004 the monthly figures for Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual total.
Source: Parks Canada

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay or profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.
Source: Statistics Canada, Labour Force Survey

5. Accommodation Indices - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.
Source: Trends in the Canadian Hotel Industry, produced by PKF Consulting Inc.

6. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places

7. Historic Sites and Museums - Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Palcontology, and the Tyrrell Field Station.
Source: Alberta Culture, Heritage Division.

24-Jan-14

Alberta Tourism Market Monitor

Monthly Update

January 2014

For the first eleven months of 2013, the occupancy rate for Alberta (excluding resorts) was 69.5%, up +2.3 points compared to 2012 (67.2%). The average daily room rate for Alberta (excluding resorts) for the first eleven months of 2013 was $137.86, up +3.8% compared to 2012 ($132.81).

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total 2013
Edmonton Occupancy Rate	54.9%	70.1%	74.1%	78.3%	71.9%	73.5%	65.0%	71.6%	74.3%	74.1%	**75.5%**		**70.9%**
Point Change from 2012	3.1	2.7	3.1	7.3	-0.5	5.0	-0.6	2.2	5.0	4.2	**2.2**		**3.0**
Average Daily Room Rate	$122.89	$126.33	$127.98	$128.28	$127.16	$128.49	$123.82	$123.80	$129.41	$130.58	**$132.61**		**$127.34**
Variance from 2012	3.0%	3.3%	3.6%	4.5%	1.7%	5.8%	4.2%	4.4%	5.9%	5.4%	**3.9%**		**4.0%**
Calgary Occupancy Rate	59.5%	66.2%	69.6%	75.5%	74.7%	75.8%	84.1%	80.5%	80.6%	77.2%	**74.7%**		**74.3%**
Point Change from 2012	2.1	2.7	1.8	7.0	3.1	-2.4	0.8	4.3	-2.2	2.4	**3.4**		**1.9**
Average Daily Room Rate	$154.93	$157.46	$152.51	$161.52	$160.89	$169.95	$186.32	$149.31	$163.85	$166.57	**$164.02**		**$163.03**
Variance from 2012	7.8%	5.2%	2.9%	7.3%	4.4%	-1.4%	1.3%	4.0%	2.7%	6.2%	**5.3%**		**3.8%**
Alberta Resorts Occupancy Rate	37.0%	44.5%	52.9%	43.1%	55.5%	64.6%	78.4%	87.1%	77.7%	51.6%	**41.2%**		**57.8%**
Point Change from 2012	1.2	0.0	3.8	-2.9	2.2	-5.1	-3.1	1.9	2.0	3.6	**4.7**		**0.6**
Average Daily Room Rate	$161.05	$167.87	$169.43	$158.48	$180.26	$226.61	$246.67	$250.19	$223.15	$172.40	**$162.92**		**$202.40**
Variance from 2012	7.8%	3.8%	3.0%	3.0%	2.2%	4.7%	4.5%	2.8%	4.8%	2.9%	**7.8%**		**3.5%**
Other Alberta* Occupancy Rate	56.1%	63.6%	63.9%	57.5%	58.7%	63.9%	70.9%	70.6%	71.1%	70.2%	**68.8%**		**65.1%**
Point Change from 2012	1.3	2.2	0.1	3.6	0.1	-1.0	4.5	2.9	4.8	4.5	**2.7**		**2.4**
Average Daily Room Rate	$124.25	$125.29	$126.14	$124.60	$123.83	$125.00	$125.45	$125.13	$125.82	$125.88	**$127.66**		**$125.50**
Variance from 2012	5.1%	4.1%	5.3%	5.1%	4.4%	3.8%	4.0%	1.4%	3.2%	2.8%	**3.8%**		**3.9%**
Total Alberta (excluding Resorts) Occupancy Rate	56.7%	66.2%	68.6%	68.2%	67.1%	70.1%	73.0%	73.8%	74.8%	73.4%	**72.4%**		**69.5%**
Point Change from 2012	2.0	2.4	1.4	5.4	0.5	0.2	2.0	3.2	2.9	3.7	**2.6**		**2.3**
Average Daily Room Rate	$133.15	$134.98	$134.50	$137.68	$136.83	$140.22	$145.28	$132.52	$138.94	$139.89	**$140.29**		**$137.86**
Variance from 2012	5.3%	4.1%	3.9%	5.7%	3.7%	2.0%	2.6%	3.4%	3.4%	4.6%	**4.5%**		**3.8%**

* Includes Lethbridge, Red Deer and other Alberta communities.

Source: PKF Consulting Inc.

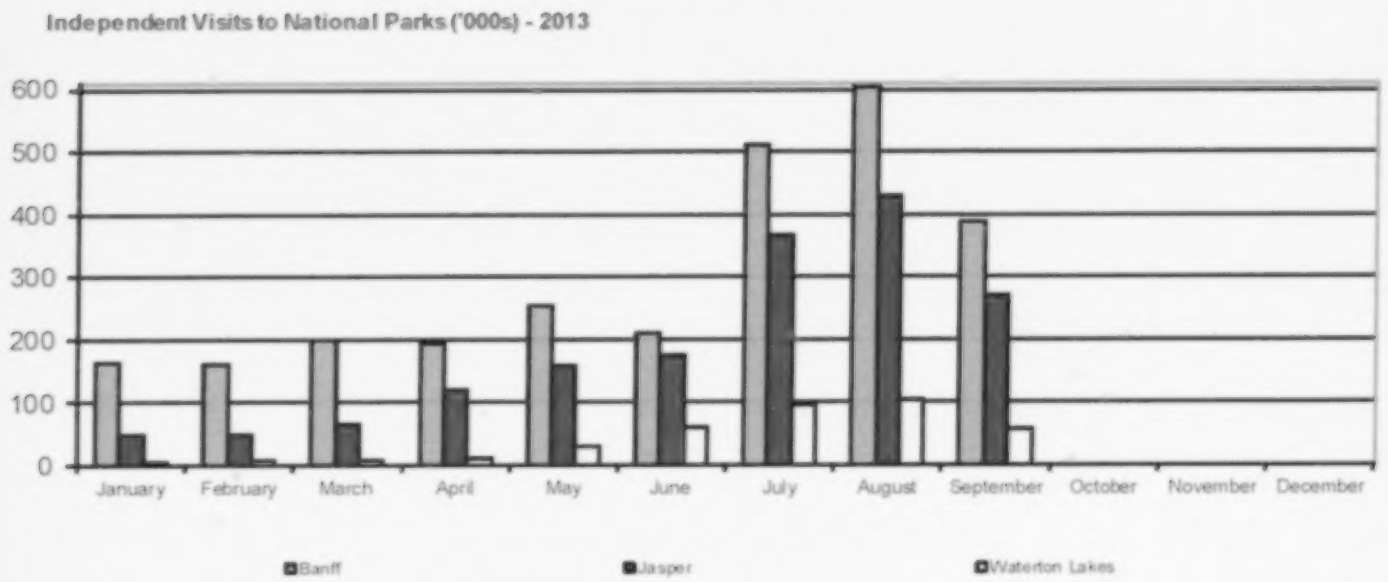
Alberta Government

Air Passengers (enplanements and deplanements)

Edmonton International Airport reported that in December 2013, 614,412 passengers either boarded or deplaned at the airport, a +9.9% increase compared to December 2012 (558,955). For 2013, 6.98 million passengers either boarded or deplaned at the airport, a +4.6% increase compared to 2012. For 2013, domestic passengers are up +4.0%, transborder passengers are up +7.7% and international (overseas) passengers are up +3.4%.

Source: Edmonton International Airport and Calgary Airport Authority. **No new data for Calgary International Airport in January 2014.**

National Park Attendance ('000s of person-visits) Group Tours not included



Source: Parks Canada. **No new data in January 2014**

Historic Sites and Museums 2013 ('000s of person-visits)

2013	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total
Visitor Attendance	21.2	42.7	42.7	42.7	74.7	101.7	158.4	181.0	69.3	40.2	24.8	**17.5**	**816.0**
% Change from 2012	6.0%	5.5%	6.4%	-5.5%	7.0%	-0.8%	-8.3%	-1.3	-4.1%	11.8%	-3.9%	**-17.2%**	**-1.5%**

Source: Alberta Culture, Heritage Division.

Employment 2013 ('000s of persons)

Employment in the Accommodation, Food and Beverage sector in Alberta increased +12.7% in December 2013, compared to December 2012. For 2013, average employment in the Accommodation, Food and Beverage sector in Alberta is up +1.4% compared to 2012.

Preliminary-Seasonally Adjusted	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Accommodation, Food and Beverage	130.3	130.7	119.1	124.2	129.9	131.9	133.6	138.2	144.0	144.6	146.4	**148.9**	**135.2**
% Change from 2012	1.3%	-5.4%	-8.1%	-6.4%	-9.6%	-0.2%	0.5%	5.0%	9.8%	11.1%	6.3%	**12.7%**	**1.4%**

Source: Statistics Canada, Labour Force Survey.

Food Services and Drinking Places 2013 ($millions)

According to results from Statistics Canada's Food Services and Drinking Places survey, Alberta's unadjusted total receipts for October 2013 were up +9.9% to $715.7 million, compared to October 2012 ($651.0 million).

Preliminary	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Total Receipts for Alberta	$606.1	$609.2	$686.3	$661.1	$700.2	$686.7	$704.6	$713.1	$696.6	$715.7			$678.0
% Change from 2012	5.1%	3.5%	4.6%	7.6%	8.3%	4.5%	5.6%	8.1%	7.2%	9.9%			6.5%

Source: Statistics Canada, Food Services and Drinking Places (Unadjusted)

Highway Traffic Count ('000s of Vehicles) 2013

Preliminary	Hwy 1—Sask border w-bound	% Change from 2012	Hwy 1—Banff Pk Gate (2 way)	% Change from 2012	Hwy 16– Jasper Pk Gate (2 way)	% Change from 2012	Hwy 16—Jct #897 w-bound	% Change from 2012
January	55.3	-2.1%	457.3	6.1%	89.9	-1.0%	165.0	1.5%
February	56.0	-0.9%	472.4	8.0%	86.4	-4.4%	160.1	-2.7%
March	63.7	2.2%	535.3	13.8%	112.9	4.2%	176.2	0.5%
April	65.5	-7.9%	459.8	-5.1%	107.3	-8.1%	178.9	-3.3%
May	78.6	3.4%	580.0	6.1%	136.3	4.3%	200.2	1.9%
June	77.3	-3.9%	457.8	-19.1%	176.3	21.7%	198.7	0.6%
July	103.1	-0.9%	782.3	-3.5%	213.2	3.6%	215.0	2.4%
August	108.7	1.2%	937.5	7.8%	247.3	7.6%	221.6	1.1%
September	80.5	0.9%	654.0	2.0%	155.9	3.9%	201.8	3.2%
October	80.4	3.7%	522.1	13.2%	118.4	6.3%	207.0	5.1%
November	65.9	5.1%	403.6	2.4%	81.0	1.9%	180.0	1.6%
December								
Year-To-Date	835.0	-0.2%	6,262.1	2.4%	1,524.9	4.5%	2,104.5	1.2%

Source: Alberta Transportation. **No new data in January 2014.**

Definitions of Indicators

Air Passengers - Data are preliminary estimates of the number of air passengers enplaning and deplaning. Source: Calgary Airport Authority and Edmonton International Airport (websites).

Highway Traffic - These data are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders count all vehicles by direction. Year-to-date is a cumulative total for all vehicles. Source: Alberta Transportation's Automatic Traffic Recorders (ATR).

Accommodation Indices— Occupancy rates and average daily room rates are based on a sample of hotels for each respective location. Source: PKF Consulting Inc., Trends in the Canadian Hotel Industry.

Historic Sites and Museums— Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Paleontology, and the Tyrrell Field Station. Source: Alberta Culture, Heritage Division.

National Park Attendance— Attendance is reported as the number of independent visits to National Parks in Alberta. Data are preliminary unless otherwise noted. Beginning in 2004, the monthly figures for Banff National Park and Jasper National Park reflected independent travellers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual total. Source: Parks Canada.

Employment in the Food and Accommodation Sector— The employment figure represents all persons 15 years or older who worked for pay or profit or unpaid work in the food services and accommodation sectors, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date figure is an average for the year. Employment figures are seasonally adjusted.
Source: Statistics Canada, Labour Force Survey.

Food Services and Drinking Places— The monthly survey provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population includes full-service restaurants, limited service eating places, special food places and drinking places. Data are unadjusted. The year-to-date figure is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places, CANSIM table: 355-0006.

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